



*MyMentorBiz*

Building  
Million-Dollar Teams

# *Work Smart Worksheets*

*agenda*

Be Purposefully  
Productive  
Using  
WORK SMART  
WORKSHEETS

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WITH GALE BATES

## work smart worksheets

Hello My Direct Seller Friend,

No one tells you how many hats you need to wear when you start a Direct Sales business. You are focused on selling your fabulous products and learning how to have successful parties. What we don't realize at the time is there is so much more and for me, I knew I needed some extra tools.

One thing I learned in building my million-dollar team is that you have to have some kind of SYSTEM that keeps you focused on how you work. That system was my Direct Sales Planner and my every day worksheets. The worksheets are tools that help you create best practices of working smarter not harder.

That's why I'm thrilled to share with you my 12 INCREDIBLE - WORK SMART worksheets to use alongside the [Direct Sales planner!](#) You'll note in each worksheet it also refers to finding more details in the DSP COMPANION workbook. In that workbook you'll find the training you need to learn how to have high sales, get consistent bookings and team build. With these three tools you have all the elements to

SET GOALS  
MAKE A PLAN  
TAKE ACTION

Use these worksheets to work SMART in your business.

- Review all your parties with the After Party Summary
- Prepare all the steps for your Facebook Party
- Check off each step for hostess coaching
- Make sure you're working the high performing activities in 4 areas
- Prep your social media theme weeks
- Make a goal to increase your customer list
- Make a goal to increase new hostess list
- Track your prime prospects to grow your team
- Review your Monthly Business recap
- Track monthly expenses and create a savings plan
- Learn the great exercise in tracking your goal backwards.

These worksheets are the TOOLS for success to help you stay on track and reach your goals in your Direct Sales Business. Once you start using them, I'd love to hear how they are working for you.

Love & Success,

Gale Bates  
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# Hostess Coaching Check-list Worksheet

Print this worksheet for every party and follow the check-list. This will help you have less party cancellations because you'll be building a BFF relationship with every hostess. This is for both a Facebook party and an in-home party. See more details in the DSP COMPANION WORKBOOK.

## 1st Hostess Connect in 24-48 hours

- \_\_\_ Confirm Party Date & Time
- \_\_\_ Review her wish list and what's in it for her!
- \_\_\_ Set sales goal to get her wish list for free!
- \_\_\_ Get started on guest list. WHO to invite
- \_\_\_ Share FUN guests will have learning products
- \_\_\_ Share HOW to invite -Give her script.
- \_\_\_ Review how to get outside orders
- \_\_\_ End connect with lots of enthusiasm.

## 2nd Hostess Connect - mid way

- \_\_\_ Check in about guest confirmations
- \_\_\_ If she's having trouble give suggestions
- \_\_\_ Go over the "Hostess Question" list. (DSP)
- \_\_\_ Get details on each of the guests
- \_\_\_ Review her outside order list.
- \_\_\_ Share FUN ways guests will learn.
- \_\_\_ Invite her to hear more about Biz Opp.
- \_\_\_ End this connect with lots of enthusiasm

## 3rd Hostess Connect - Day before

- \_\_\_ Let her know you'll arrive 30 mins early
  - \_\_\_ If it's a Facebook Party, review pre-posts
  - \_\_\_ Ask Hostess to text/IM reminder to guests
  - \_\_\_ Send reminder email to guests
  - \_\_\_ Prepare scheduled posts & graphics
  - \_\_\_ End connect again with lots of enthusiasm
- "I'm really looking forward to seeing you and your friends tomorrow!"*

## Hostess Details

Hostess Name

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Hostess Telephone & Email

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Hostess Party Date

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In-Home Party    Facebook Party    Other

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Sent Hostess Letter and Packet

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Sent Wish List and Guest List handouts

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Other Information about Hostess

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# FACEBOOK PARTY Worksheet

Facebook parties take planning. Print this worksheet and prepare your list. (See the DSP COMPANION workbook for more details on having a successful Facebook Party.)

## Before Party Tasks

### Date Task

- \_\_\_ Create event on Biz Page or Group.
- \_\_\_ Schedule 3 connects w/hostess.
- \_\_\_ Give Host Invite script to share with guests.
- \_\_\_ IM Guests who are "going" with one question.
- \_\_\_ Send catalog/samples to guests who request.
- \_\_\_ Create Wish List (Google form) for guests.
- \_\_\_ Prepare pre-posts/graphics (number all posts)
- \_\_\_ Prepare posts for Party time (number all posts.)
- \_\_\_ Prepare LIVE portion to wow guests!
- \_\_\_ Ask Hostess to message all guests to confirm.

## During Party Tasks

### Date Task

- \_\_\_ Welcome LIVE INTRO with Hostess if possible.
- \_\_\_ Post Product benefit/solution posts (about 5-10)
- \_\_\_ Post Personalized Shopping link for guests.
- \_\_\_ Create Personalized list of products for each guest.
- \_\_\_ **Post** Booking & Recruiting seed.
- \_\_\_ Invite guests to join VIP Customer group w/link.
- \_\_\_ Do Video product posts (about 3)
- \_\_\_ Do a LIVE OUTRO THANK YOU!
- \_\_\_ Offer Concierge Check-out.

## After Party Tasks

### Date Task

- \_\_\_ Schedule Concierge Checkouts with guests.
- \_\_\_ Write Thank you note to Hostess.
- \_\_\_ Follow-up with 3 Prime Prospects.
- \_\_\_ Write Thank you to Guests.
- \_\_\_ Invite guests to VIP group with link.
- \_\_\_ Follow-up with Future Bookings for dates.
- \_\_\_ Schedule Recruiting Appointments.

## Comments & Posts to use in FB Event

Product Benefit Posts + Specials

Number all posts

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Booking Seed Posts

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Recruiting Seed Post

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Intro Live Video

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Outro Live Video

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Follow-up Thank you Posts

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# AFTER PARTY SUMMARY Worksheet

Print this worksheet after every party. Make a list of guest sales. Check who booked. Check who joined your VIP group, check if you met a recruit lead. Tally up sales, bookings and recruit leads and use this workshop for follow-up.

<b>Party GOAL</b>
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Sales
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Bookings
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Recruit Leads
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<b>Hostess Name</b>
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**Type of Party**

- In-Home**
- Catalog**
- Facebook**
- Other**

<b>Party Date</b>
<b>Closing Date</b>

<b>Party Results</b>	
Total Sales	_____
# Bookings	_____
# Recruit Leads	_____
Total Profit	_____

<b>Hostess Rewards</b>	
Total Sales	_____
Hostess Order	_____
Hostess Rewards	_____
Total Profit	_____

### Important Follow-up to get results from every party

Write each guest name and who ordered, who booked, who to add to VIP group and who is a Recruit lead.

Hostess/Guest Name	Amount \$	Booked #	VIP grp	Amount \$
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____

# Daily Success Activities Worksheet

If you focus on these **FOUR IMPORTANT** areas in you Direct Sales Business every day, you will see amazing results. These Daily success activities help you focus on your goals. Print this page and create a Daily Activity list each day in your planner. See more details in the *DSP COMPANION* workbook.

## HIGH REVENUE ACTIVITIES

### Recruiting Activities

- ➔ Share Biz Opportunity 2x week
- ➔ Plant recruiting seeds at every party
- ➔ Hand out 3 Recruiting Packets at every party
- ➔ Schedule Recruiting appointment
- ➔ Bring Guest to Opportunity Events
- ➔ Bring Guest to Team Meeting
- ➔ Invite Prospect to "Take A Look" Call
- ➔ Post success stories from your biz on Social Media
- ➔ Invite Prospect to join Prime Prospect FB Group

### Party Activities

- ➔ Book party with Hostess in home
- ➔ Book party with Hostess on Facebook
- ➔ Coach hostess using the 3 connect formula
- ➔ Plant 3 booking seeds at every party
- ➔ Participate in vendor event, Trade show/expo
- ➔ Participate in Booking Blitz to keep calendar full.
- ➔ Create blocks of time to connect & get bookings
- ➔ Create a maybe later list of Hostesses
- ➔ Follow-up with past hostesses to re-book
- ➔ Post Images of Parties on Social Media

### New Business Activities

- ➔ Attend networking events
- ➔ Hold private appointment with new customer
- ➔ Hand out 3 business cards
- ➔ Hold Group Presentations for offices
- ➔ Create Social Media branding posts
- ➔ Blog about your business to attract new customers
- ➔ Ask hostess to invite 3 people you've never met.

### Follow-up Activities

- ➔ Schedule 15 minutes a day on Customer Care
- ➔ Call three prime prospects after every party
- ➔ Connect with hostesses who booked at parties
- ➔ Follow-up w/in 24 hrs with people from trade show
- ➔ IM new customers invite to VIP Customer FB group
- ➔ Post images team members on social media

## Today's Daily Activities

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# Social Media Worksheet

Choose your Social Media Platform. Create a Theme for each week, and write posts around that theme each day sharing your products & business opportunity See more details in the DSP COMPANION WORKBOOK.

**This Week's THEME:**

MON	TUES	WED	THURS	FRI	SAT	SUN

**This Week's THEME:**

MON	TUES	WED	THURS	FRI	SAT	SUN

**This Week's THEME:**

MON	TUES	WED	THURS	FRI	SAT	SUN

**This Week's THEME:**

MON	TUES	WED	THURS	FRI	SAT	SUN

# NEW CUSTOMER List Worksheet

Set a goal to add 20 New customers to your data base every month. Print out this worksheet and add name, email, telephone and make a check when you've added them to your VIP Customer Facebook Group & Customer newsletter list.

#	New Customer	Email	Telephone	VIP FB Group	Customer Newsletter
1					
2					
3					
4					
5					
6					
7					
8					
9					
10					
11					
12					
13					
14					
15					
16					
17					
18					
19					
20					



# NEW HOSTESS List Worksheet

Set a goal to add 20 New HOSTESSES in the first 6 months of the year. Print out this worksheet and add details on new hostesses checking when you've added them to your VIP Customer group and Prime Prospect Facebook Group. (See DSP COMPANION workbook for more details.)

#	New Hostess	Email	Telephone	VIP FB Group	FB PP Group
1					
2					
3					
4					
5					
6					
7					
8					
9					
10					
11					
12					
13					
14					
15					
16					
17					
18					
19					
20					

# PRIME PROSPECT List Worksheet

There are people at parties who are interested in your business. We call them PRIME Prospects. Print this sheet out, keep it close and work on adding 20 names of people who you want to share you business opportunity. See DSP COMPANION workbook for more details.

#	Prospect Name	Prospect Contact Info	Date Shared Biz Opp	Next Followup	Ready to Join
1					
2					
3					
4					
5					
6					
7					
8					
9					
10					
11					
12					
13					
14					
15					
16					
17					
18					
19					
20					





# Monthly Business RECAP Worksheet

Summarize your monthly Income & Expenses and collect important information for taxes. Print out Expense Worksheet. Know if you made a profit or a loss in your business EVERY month!

## MONTHLY INCOME

Personal Sales		Retail Sales
TOTAL all party sales for the month		\$
TOTAL ALL other sales for the month		\$
	TOTAL Personal Sales	\$
<b>Figure Total Income</b>		
Commission on Personal Sales Multiply % on Total Sales above	%	\$
Commission earned on Team Sales	\$	\$
Bonuses earned on Team Sales	\$	\$
<b>Total Income</b>		\$

## MONTHLY EXPENSES

List Expenses for the Month		
Travel Expenses from Worksheet in back		\$
Entertainment Expenses from Worksheet in back		\$
Office Expenses from Worksheet in back		\$
Other Expenses from Worksheet in back		\$
<b>Total Expenses</b>		\$

Deduct Total Expenses from Total Income.  
You now have monthly Profit or Loss

\$

Follow the MONEY MANAGEMENT section in the DSP COMPANION WORKBOOK.

# End of Month Review Worksheet

Take a few moments at the end of each month and review your stats and where you're going with your goals.

What was your biggest achievement this month?

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What would you have done differently?

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## End of month Stats you want to track

# New customers

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# Customers in VIP Group

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# New Recruits to Date

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# New Recruits to Date

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Sales towards achieving trip incentive

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Other \_\_\_\_\_

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Other \_\_\_\_\_

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# Track your Goal Backwards Worksheet

Tracking your goal backwards is a way to stay focused on achieving a special sales goal. Write your goal then start deducting each order until you hit ZERO! See DSP COMPANION workbook for more details.)

Sales Goal \$ \_\_\_\_\_ in 30 days!

Start Date	Amount of Order \$	Deduct \$	Grand Total \$
30	_____	_____	_____
29	_____	_____	_____
28	_____	_____	_____
27	_____	_____	_____
26	_____	_____	_____
25	_____	_____	_____
24	_____	_____	_____
23	_____	_____	_____
22	_____	_____	_____
21	_____	_____	_____
20	_____	_____	_____
19	_____	_____	_____
18	_____	_____	_____
17	_____	_____	_____
16	_____	_____	_____
15	_____	_____	_____
14	_____	_____	_____
13	_____	_____	_____
12	_____	_____	_____
11	_____	_____	_____
10	_____	_____	_____
9	_____	_____	_____
8	_____	_____	_____
7	_____	_____	_____
6	_____	_____	_____
5	_____	_____	_____
4	_____	_____	_____
3	_____	_____	_____
2	_____	_____	_____
1	_____	_____	<b>ZERO!</b>